



**Government
of South Australia**

South Australia Trade and Investment Strategy to 2030

Acknowledgement of Country

The Government of South Australia acknowledges and respects Aboriginal people as the state's first people and nations, and recognises Aboriginal people as traditional owners and occupants of South Australian land and waters.







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A message from the Premier



Our state has a once in a generation opportunity to expand our economy – for the benefit of all South Australians.

To do so, we must position South Australia strongly in the global economy, leveraging our industry strengths and natural resources to provide more of what the world wants and needs.

That requires a whole-of-government approach to trade and investment facilitation and related industry policy, with a focus on increasing exports and attracting investment in industries and markets where we have competitive advantages.

The *State Prosperity Project*, launched last year, outlines how we're preparing the state to support the global energy transition, which will drive the world's economy for decades to come.

Our unique combination of sun, wind and valuable minerals in the Upper Spencer Gulf and surrounds, position our state as a global green economy leader.

As Australia's defence state and under the AUKUS partnership, South Australia will lead construction of nuclear-powered, conventionally-armed submarines – the most sophisticated machines to ever be built.

We're known around the world for our premium food and wine products, sourced and produced sustainably from our pristine natural environment.

Our state is commercialising new products and services for diverse industries, while working in concert with world-class education institutions.

This work is what enables South Australia – and our partners – to help address globally important issues like climate change, national security, and food security.

What's more, our green economy leadership and infrastructure provides global economies with a strategic partner to help achieve decarbonisation goals.

This strategy outlines how we will work with business, industry and government partners globally, to strengthen trade and investment relationships.

Hon Peter Malinauskas MP

Premier of South Australia

A message from the Minister for Trade and Investment



South Australia has a long history of global connections that deliver economic benefits for our state and for our partners overseas.

Investment sourced both domestically and from international markets will make our state an increasingly engaged global economy and brings in know-how and best practice from around the world.

It also drives development of skills needed for our future economy, giving us access to global technology and research that helps develop our sovereign capabilities.

Investment also creates jobs. In South Australia, manufacturers with foreign investment generate twice as much employment as other manufacturers and supported more than 22,000 jobs in the last financial year.

We also know investment supports creation of new and innovative products and services – which help address global challenges – and in turn, provide new export opportunities.

That's important because exporters have shown to be more productive, more skill and capital-intensive, more innovative, and higher paying than non-exporting firms.

In our state, one in every eight jobs is generated by exporters and 15.4 per cent of South Australia's gross state product is attributable to trade.

There's significant potential to expand our international partnerships, despite uncertainty in the global market place.

We need to position our state to navigate shifting geopolitics, supply chain disruptions, uneven global economic growth, and evolving market access requirements.

In the face of global instability, South Australia's natural economic advantages and streamlined and accessible government are more important than ever.

In South Australia, we offer investors sound and efficient regulatory frameworks, and an inter-connected business and government ecosystem that makes us easy to work with.

I look forward to the Department of State Development (DSD) leading a whole-of-government effort to deliver this strategy in partnership with industry.

Hon Joe Szakacs MP
Minister for Trade and Investment

Why trade and investment matters

Trade and investment creates jobs, builds local industry capability, increases productivity, drives product innovation, and supports business resilience across our state.

South Australia's exports have been at record-high values in recent years and the state has also been attracting growing interest from investors with a steady pipeline of projects and capital investment.

South Australia also has strong national rankings for economic growth, performance and as a destination to do business.

Maintaining this momentum – including by capturing a larger share of national exports and attracting high-impact investments – will continue generating prosperity and productivity for all South Australians.

Building economic resilience through diversifying both our exports and source countries of investment is also key to maintaining growth when dealing with a changing global environment.

Across the nation, exporters and companies with foreign direct investment (FDI) pay higher wages, they are more productive and more innovative.

In South Australia



229,200+

jobs linked to export



23,650+

jobs created as a result
of capital investments in
the ten years to 2023/24

Trade at a glance



\$21.6b

in added value
annually
ABS Blade Data



\$22.8b

in annual exports
merchandise and services,
including international
education, tourism and
business services



15.4%

of South Australia's
GSP is attributable
to trade

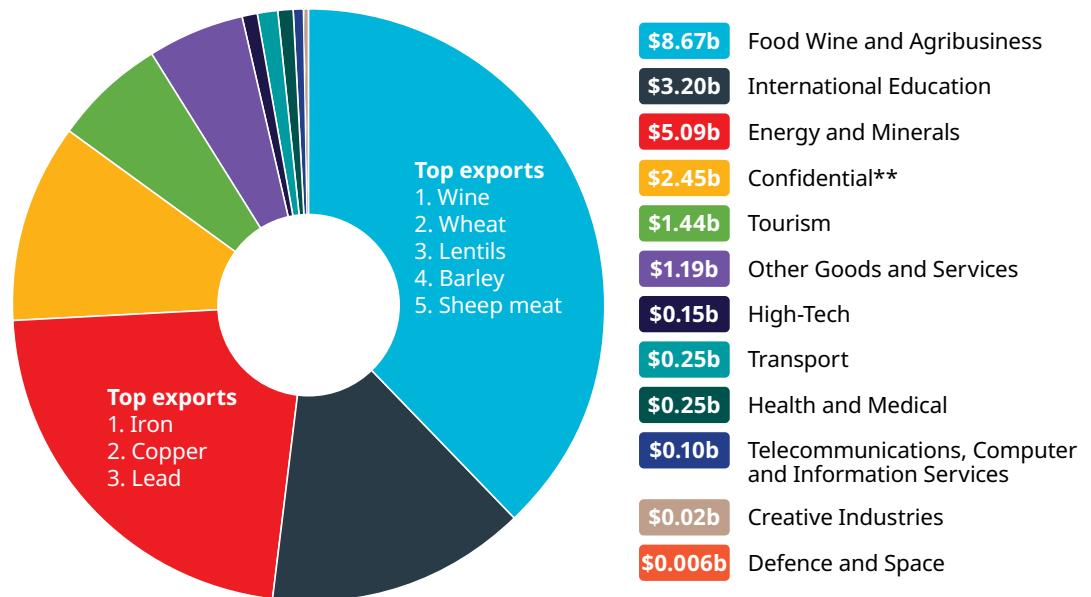
Investment at a glance



\$20.1b

capital investment
in the ten years to 2023/24

South Australian exports by sector 2023/24*

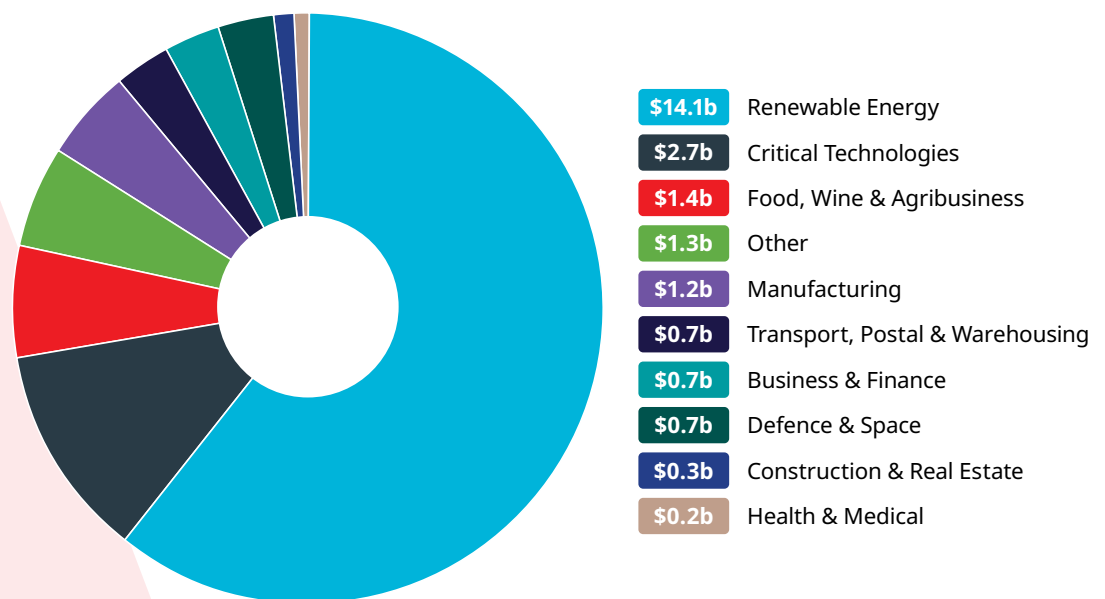


*Source: Australian Bureau of Statistics, International Trade in Goods and Services for the year ending June 2024

**The ABS compiles trade data from exporter declarations submitted to the Australian Border Force. Exporters—or the ABS itself—can classify commodity groups as confidential to protect sensitive details.

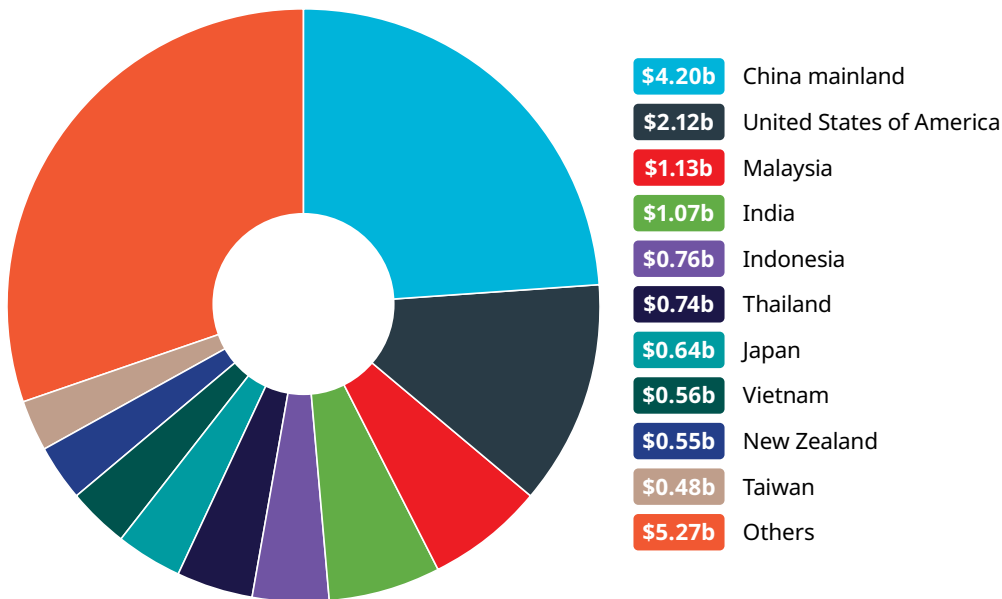
South Australian inward investment by sector for the ten years to 2023/24*

Based on accumulated announced Greenfield FDI into South Australia



*Source: FDI Markets, data for the ten years ending June 2024

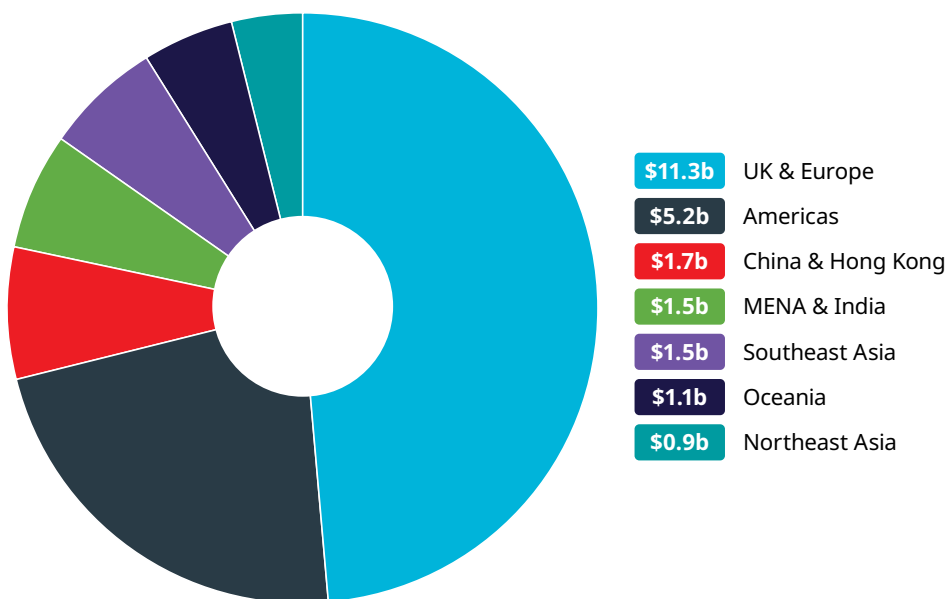
South Australian export markets 2023/24*



*Source: Australian Bureau of Statistics, International Trade in Goods for the year ending June 2024

South Australian inward investment source markets for the ten years to 2023/24*

Based on accumulated announced Greenfield FDI into South Australia



*Source: FDI Markets, data for the ten years ending June 2024

Our objectives

The *South Australia Trade and Investment Strategy to 2030* will ensure alignment across government and industry in attracting investment to South Australia and increasing the state's exports.

In line with the *South Australian Economic Statement* and taking account of existing industry growth plans, the strategy targets opportunities in sectors and markets where South Australia has globally competitive advantages.

It sets key pillars for trade and investment activity that deliver a holistic approach to lifting performance.

The strategy will leverage government, diplomatic and regulatory frameworks, and will inform the government's broader international engagement agenda.

The strategy sets measurable targets for trade and investment growth aligned to government priorities.

-  **1** Increase exports as a percentage of South Australia's economic output from 15.4 per cent in 2024 to 18 per cent by 2030
-  **2** Increase investment as a percentage of national FDI share to 5 per cent and increase the diversity of the source countries
-  **3** Increase the number of South Australian exporting businesses and increase the diversity of exporters across sectors
-  **4** Improve trade and investment outcomes for First Nations, regional and women-led businesses
-  **5** Increase the number of South Australian jobs linked to export and investment



How we will deliver

The strategy sets seven pillars for whole-of-government trade and investment promotion. Existing and new initiatives are aligned to these pillars.



Market and sector prioritisation based on competitive advantages

- Focused on industry sectors with robust growth strategies and opportunities arising from emerging markets and global trends
- Defends our state's presence in mature markets
- Positions South Australia for long-term growth in emerging markets
- Leverages market access opportunities through bilateral and regional free trade agreements

1



Enhanced trade and investment advisory services

- Invest SA facilitates investment into South Australia by connecting investors and companies with opportunities, industry networks, and other government agencies in South Australia
- TradeStart program – partnering with Austrade – builds exporter capability and connects businesses with global importers
- South Australia's network of global offices provides on-ground advice and support
- Grants for high-growth exporters accelerate commercial outcomes

2



Targeted business missions

- Bespoke outbound business missions deliver export and investment outcomes
- South Australian presence at major national and international industry events conveys a compelling, consistent value proposition to investors and importers
- *South Australia Club International* provides a platform to engage with investors in global investment hubs: London, New York, Singapore, Hong Kong and Shanghai

3



Leveraging major events

- South Australia's high-profile portfolio of major events support investment and export outcomes for the state
- Global investors, high-net-worth individuals, and leading importers are supported through targeted industry and business programming alongside major events, facilitating connections with South Australian business partners
- In-event hosting facilitates connections between decision-makers in government, business, and industry
- Major events project to the world, a compelling case for South Australia as a partner

4



Government and industry partnerships drive commercial outcomes

- Priority government-to-government partnerships led by the Department of the Premier and Cabinet (DPC) open doors for exporters and investors
- StudyAdelaide activations and promotions drive enrolments and partnerships
- Food and wine programs partnering with the likes of Food South Australia and the South Australian Wine Industry Association help diversify and grow export markets
- Department of Foreign Affairs and Trade (DFAT) initiatives, such as high-level official visits to South Australia, support outcomes in priority sectors and markets
- Team Defence Australia initiatives highlight South Australia's defence industry strengths and the Defence Supplier Uplift Program connects innovative exporters with global defence primes
- Tourism Australia events and campaigns promote South Australia's unmatched visitor experiences

5



Inclusive trade and investment growth creates opportunities

- First Nations uplift initiatives deliver economic outcomes for Aboriginal businesses and communities
- Regionally-based TradeStart advisors build exporter capability and connect businesses with global importers
- Office of Small and Family Business advisors provide advice to start, run and grow small businesses, including navigating regional challenges
- Collaboration on Regional Development Australia initiatives helps facilitate trade and investment for the regions
- Women in business are supported to pursue goals, through various DSD-led initiatives

6



Sharing with the world a compelling and consistent case for South Australia

- Led by Brand SA, a unified State Brand takes South Australia's story to the world, amplifying commercial opportunities
- Destination campaigns by the South Australian Tourism Commission (SATC) drive the visitor economy
- StudyAdelaide activations and promotions grow global preference for Adelaide as an education destination
- Multicultural Chambers of Commerce provide expertise and connections to help position South Australia in international markets

7

South Australia's globally competitive industry sectors



Renewables, fuels and cleantech

- A global net zero leader, with 75 per cent of energy from renewables
- Home to seven grid-scale batteries
- A welcoming and easy-to-navigate regulatory environment



Mining and minerals processing

- Rich in critical minerals to support the global energy transition
- Primed to lead the world in green mineral processing
- A critical technology ecosystem driving sustainable industry solutions



Defence and space

- Australia's defence and space state, delivering the nation's most complex projects
- Leading the construction of nuclear-powered, conventionally armed submarines
- World-leading critical and national security technologies
- Dynamic and fast-growing space ecosystem



International education

- Adelaide is a leading education city, with institutions across all areas of study
- Home to universities that rank in the top 100 world-wide
- The new Adelaide University will be globally competitive and industry-connected
- Major investments are designed to win a greater share of research funding



Tourism

- Pristine natural environment offering premium food and wine, diverse and stunning natural landscapes, and some of the world's best festivals and events
- Investment opportunities for eco-tourism, experiences and accommodation



Food and agribusiness

- Trusted agricultural producer and food manufacturer with internationally recognised food safety record
- Home to the Southern Hemisphere's largest concentration of food and agricultural research, and largest commercial fishing fleet
- A leader in the circular economy, including recycling, resource recovery and value-added manufacturing



Wine

- The indisputable wine capital of Australia and recognised as a Great Wine Capital of the World
- Producing 80% of Australia's premium wine across 18 iconic wine regions



Health and medical

- Australia's most experienced clinical trials ecosystem
- Strong research and commercialisation record through industry and government investment



Critical and emerging technologies

- Concentration of frontier technologies in artificial intelligence (AI), machine learning, analytics, cyber and digital aligned to the state's globally competitive industry sectors
- An innovation ecosystem underpinned by world-class infrastructure and transformational institutes conducting leading-edge research and development through a culture of innovation

Target markets and South Australia's global offices

South Australia's globally competitive industries and businesses will be promoted in markets where there is demand for what our state has to offer.

Offices in strategically important markets, staffed by South Australian Government representatives, will work to match South Australian business with partnership opportunities.



United States and United Kingdom

Comprehensive economic partnerships spanning trade, investment, innovation and industry development across diverse sectors, and AUKUS partners.



Emerging growth market: India

India is a dynamic market – the fastest growing large economy in the world – presenting significant long-term trade and investment opportunities for South Australia.

Why India?

- India is the world's most populous country and set to be the third largest global economy by 2030
- India's youthful demographics – with 40 per cent of the population aged under 25 – are fuelling demand for education services and consumer products
- India's food security demands make it the world's largest import market for grains, pulses and other agrifood commodities
- India is a technology superpower and home to global tech giants, driving technology investment opportunities
- The Australia-India Economic Cooperation and Trade Agreement (ECTA) has lowered tariffs across a range of key South Australian export categories.
- Major investments under Make in India program will position India as a green industrial leader and supply chain partner for global export of green products.

Market strategies

We will position our state to realise opportunities in India through a coordinated approach across government, industry and business.

We will leverage preferential market access afforded through the Australia-India Economic Cooperation and Trade Agreement (ECTA).

To support business navigating India, we will build industry and business capability and market literacy.

Through a targeted program of market engagement, we will promote South Australia as a preferred partner for India in food security, energy security, education and skills.

We will also partner with the Australian Government on programs and activities under the *India Australia Economic Roadmap*.

Activity

- Business missions aligned with high-level government visits covering priority sectors, including education, agrifood, energy and technology
- Strategic partnerships with India's largest corporate conglomerates to deliver investment and support for South Australian access to global supply chains
- Food security partnership program to support joint research, technology partnerships, regulatory exchange, and commercial engagement in grains, pulses, horticulture, red meat, and wool
- Energy security programs will drive two-way investment, offtake and technology projects to meet net zero ambitions
- Support for South Australian business participation in Australian Government Australia-India Business Exchange trade missions.

An important global market for energy market software simulation

Energy Exemplar, the brainchild of Adelaide-based scientist Dr Glenn Drayton, develops and licenses energy modelling and simulation software internationally, with India a strategically important market for the company's global operations.

Founded in Adelaide, Energy Exemplar is a global leader in energy modelling and simulation software. Its product portfolio, including PLEXOS®, Aurora, and Adapt2, is trusted by stakeholders across the entire energy ecosystem, from generation to consumption, including power, gas, water and renewables.

Energy Exemplar helps stakeholders not only plan future infrastructure but also optimise day-to-day operations, enabling smarter, faster, and more sustainable energy decisions worldwide.

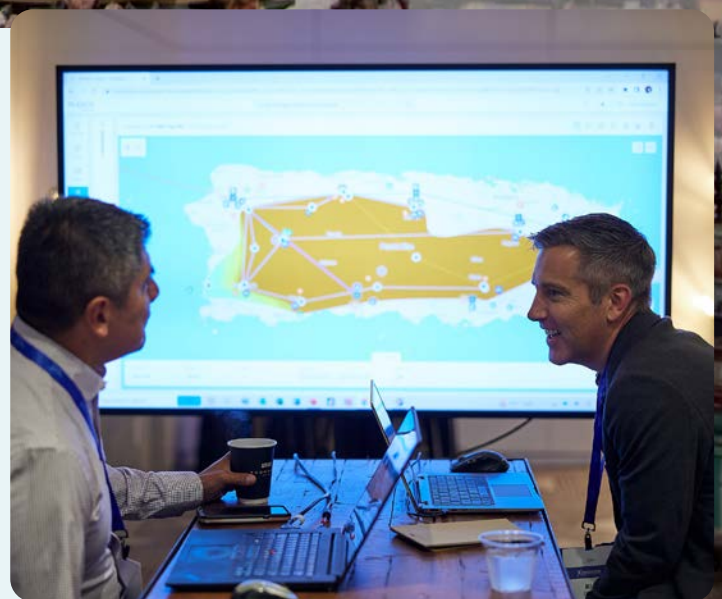
The company's globally successful software gained traction when Dr Drayton formed partnerships with consulting firms worldwide to gain access to expertise and opportunities to apply it.

Energy Exemplar has been growing strongly since 2018 and currently serves more than 600 customers across 89 countries.

It opened its first office in Pune, India in 2018, now known as the "India Centre of Excellence", focusing on innovation in energy modelling and simulation, representing an opportunity for South Australia to collaborate internationally on renewable energy technologies.

In 2024, Energy Exemplar was acquired by private equity funds affiliated with Blackstone and Vista Equity Partners.

The company has been supported, over several years, by the South Australian Government's global office network in collaboration with Austrade, to support growth in international markets.



"Our roots in South Australia, supported by the state's international trade network, have helped us expand into some of the world's most dynamic energy markets.

"India is a standout example. With its ambitious target of sourcing 50 per cent of electricity from renewables by 2030, there is growing demand for advanced modelling technology that supports smart investment and reliable grid integration. Through our team in India and our global expertise, we're helping accelerate that transition with clarity and confidence."

**Stuart Kelly, Chief Revenue Officer,
Energy Exemplar**

Emerging growth market: Southeast Asia

The rapid economic growth of the Southeast Asian region presents significant long-term trade and investment opportunities for South Australia.

Why Southeast Asia?

- Southeast Asia will be the world's fourth-largest economy by 2040, after the United States, China and India
- By 2040, the region will be an economic powerhouse fuelled by favourable demographics, industrialisation, urbanisation and technological advances
- A rapidly expanding middle-class will drive increased demand for premium food, wine and consumer products, as well as education and tourism services
- The region's digital economy will be valued at US\$1 trillion by 2032, presenting growth opportunities across critical and enabling technologies
- The Association of Southeast Asian Nations (ASEAN), Australia-New Zealand Free Trade Agreement (AANZFTA) and Regional Comprehensive Economic Partnership Agreement (RCEP) improve and streamline market access
- Focus on Singapore, Malaysia, Vietnam, Indonesia, Thailand, and the Philippines to maximise commercial opportunities and support diplomatic links.

Market strategies

The Southeast Asian region presents diverse opportunities that span South Australia's industry strengths. By working across government and with industry and business, we will prepare the state to respond to arising demands.

We will leverage preferential market access afforded through Australia's network of bilateral and regional free trade agreements in these markets.

Through both regional and bilateral business development programs, we will promote South Australia as preferred partner in food and agribusiness, wine, critical and emerging technologies and education.

We will also partner with the Australian Government on programs and activities under the *Invested: Australia's Southeast Asia Economic Strategy to 2040*.

Activity

- Annual Ministerial business missions to priority Southeast Asia markets
- South Australia Club International Singapore to strengthen strategic relationships with key regional investors
- Support for South Australian business participation in Australian Government Australia-Southeast Asia Business Exchange trade missions
- Support for South Australian technology exporters through Australian Government innovation Landing Pads in Singapore, Indonesia and Vietnam
- Support for South Australian education institutions to promote their offering through in-bound familiarisation tours and marketing programs.



Family-owned business feeding the world

Thomas Foods International is a red meat processor and exporter, founded in 1988. Headquartered in Adelaide, the company has grown from small beginnings to become one of Australia's largest family-owned food businesses and a global leader in the export of premium red meat, with a \$3 billion annual global turn-over.

The company has full control over its supply chain, with teams across Australia, China, Singapore, USA, Canada, the UK, United Arab Emirates, Japan, and Europe. It supplies high-quality Australian lamb, mutton, goat, and beef products.

It's continued expansion across key target markets, including Southeast Asia, focuses on markets where there is increasing interest in premium quality food products.

The company has worked collaboratively with the South Australian Government over many years, in efforts to expand its business partnerships. Company representatives have participated in multiple international trade missions and promotions, including Food Hotel Asia in Singapore during April 2025 and it has also benefited from specialist export advice through the TradeStart network and South Australia's global office representatives.



"Part of the secret behind our success is that we branch out into new markets, with a good understanding of the changing demands and tastes of consumers. We're grateful for the opportunities to respond to these – with the support of the South Australian Government's connections, introductions and promotion and marketing activities."

**Darren Thomas, Chief Executive Officer,
Thomas Foods International**

Research and innovation ecosystem driving international partnerships

South Australia has research and innovation strengths critical to inspiring and developing solutions to global challenges.

While artificial intelligence (AI) is entering mainstream use, and new technological innovations transform our industries, South Australia is equipped to embark on the next economic transition.

The state has world-leading research capabilities in AI and data analytics, advanced manufacturing, energy transition, defence and space technologies, health, agriculture, and food and wine. Those capabilities are driving research and innovation that unites high-profile businesses, academia, industry bodies and government.

It is this collaboration – that’s in the South Australian DNA – driving government and private sector investment to grow local startups eager to engage in this dynamic ecosystem.

The Department of State Development (DSD) works closely with industry, universities, research organisations and governments to promote research translation and commercialisation.

The department connects founders with the tools, knowledge and resources required to accelerate business success and achieve commercial outcomes.

The South Australian Government’s **Innovation Places Leadership Framework** also seeks to ensure the state’s innovation ecosystems continue driving accelerated innovation capability and economic complexity.

Through current and future investment, implementing this framework is expected to unlock state-wide employment for over 42,000 people while supporting investment attraction, regional connectivity and workforce development.

Innovation and technology ecosystem strengths

Top 5

Adelaide’s ranking in the Oceania region for its start-up ecosystem



Home to the Australian Institute for Machine Learning



Extensive National Collaborative Research Infrastructure



Targeted programs driving research and industry collaboration that translates to commercial outcomes

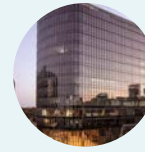
Leading innovation destinations



Lot Fourteen is growing capabilities in defence, space and critical technologies.



Tonsley Innovation District is the home of high-value manufacturing.



Adelaide BioMed City is the largest health and life sciences precinct in the Southern Hemisphere.



Waite Research Precinct is a world-class agricultural precinct.



Osborne Naval Precinct is Australia's premier naval industry hub.



Technology Park is a hub for systems development and integration.



Edinburgh Defence Precinct enhances defence capabilities and improves national security.

Clinical trials company finding solutions to international healthcare challenges

CMAX Clinical Research has been a leader in delivering early phase clinical trials for more than 30 years, making it one of the most respected clinical trial businesses in Australia.

The company's custom-built facility, opposite the Royal Adelaide Hospital and within Adelaide BioMed City, conducts clinical trials for sponsor companies from all over the world.

This location provides ready access to state-of-the-art facilities, equipment and world-class medical and pharmacology specialists working at Adelaide BioMed City which co-locates universities, government, hospitals and more than 2,000 researchers.

The South Australian Government has provided support to CMAX over many years with the Invest SA team and global office network helping to identify potential customers and close a number of deals (particularly in South Korea and China).

CMAX has also worked with the South Australian Government to build connections at global healthcare events like the BIO International Convention in Boston, which DSD has led a Team Australia delegation to for four years running. The company has also benefited from grant funding for research and commercialisation activities.



"Adelaide has been set-up, like no other city in Australia, to be the best place to conduct clinical research. Not only can we offer great speed to start-up for early phase clinical trials, but we have access to all the specialists we need at Adelaide BioMed City.

"Adelaide's innovation ecosystem is resulting in world class clinical trial innovation and investment, with customers keen to capitalise on South Australia's speed, quality and value."

Jane Kelly, Chief Executive Officer, CMAX

Inclusive trade and investment growth

It is important all South Australians share in the benefits and prosperity that trade and investment opportunities can bring.

South Australian Government programs will be designed to support inclusive trade and investment growth.

First Nations economic uplift

The South Australian Government, led by DSD, will provide support, advice and tools to enable First Nations business growth in domestic and international markets.

A program to be developed and delivered in partnership with key Aboriginal stakeholders and other government agencies, would include:

- grants to support First Nations businesses with business and export capability
- support for First Nations businesses to participate in business missions, connecting South Australian First Nations exporters with international partners
- dedicated trade and investment advisory services for First Nations businesses
- support to position First Nations tourism and hospitality businesses to attract domestic and international visitation
- support to become investment-ready and with tailored introductions to potential investors.

Supporting women in business to pursue trade and investment goals

The **Office of Small and Family Business** – within DSD – delivers the Women in Business Program designed to support women-owned businesses in South Australia. It includes initiatives to give entrepreneurial-minded women every opportunity to pursue their goals, leading to a more diverse and inclusive business community in South Australia.

The support includes capability and skills development opportunities through mentoring as well as scholarships to support women leading high-growth businesses to improve their leadership skills and establish best practice governance and strategic planning.

The **Office for Women** – within the Department of Human Services – is also working with DSD to further develop supports for women-led businesses, while also focusing on increasing the number of women in the key male-dominated export industries including: defence, space, and renewable energy.

National Closing the Gap Strategy

South Australia's Closing the Gap Implementation Plan outlines actions to support priority reforms and 17 socio-economic outcomes for First Nations peoples.

First Nations trade and investment uplift activities strengthen South Australia's delivery against Outcome 8: By 2031, *increase the proportion of Aboriginal and Torres Strait Islander people aged 25-64 who are employed to 62 per cent.*

Engaging regional businesses in trade and investment

South Australia's regions are a key source of economic activity for the state, with approximately 72 per cent¹ of goods exports (by value) sourced or produced outside of Greater Adelaide. Indeed, over the last decade over 20 per cent of investment projects have been announced in regional areas.

TradeStart Advisors – working within DSD through a partnership with Austrade – provide tailored export advisory services and export readiness initiatives to many businesses in regional areas.

Advisors are based in regional (as well as metropolitan centres) and have expertise in industry sectors across the Adelaide Hills, Fleurieu Peninsula, Kangaroo Island, Eyre Peninsula and Whyalla, Yorke Peninsula and Mid/Far North, Barossa Valley, Clare, Limestone Coast, Riverland and Murraylands.

Their local knowledge – combined with export expertise – assists regional businesses to develop export growth plans, assess market selection, determine entry strategies and access grants, assistance and international opportunities through South Australia's global offices and Austrade's TradeStart network.

The **Office for Small and Family Business** – within DSD – provides information and resources to help start, run and grow small and family businesses.

Business Support Officers in regional and rural South Australia offer tailored one-on-one support, and the office also delivers a range of industry capability support programs across the state.

The South Australian Government also collaborates with **Regional Development Australia (RDA)**, which brings together all levels of government to help achieve regional goals.

Global pioneering space company led by fierce advocate for women in business

Pioneering space exploration company, Fleet Space Technologies, was established in Adelaide in 2015, and has since become a global force transforming the future of exploration on Earth and beyond.

The company is led by Chief Executive Officer and Co-founder, Flavia Tata Nardini – a real-life rocket scientist, former propulsion engineer at the European Space Agency, and fierce advocate for women in STEM and in business.

A recipient of the 2022 South Australian Pearcey Entrepreneur of the Year Award, Nardini's company is revolutionising the mineral exploration, defence, and space exploration sectors through groundbreaking satellite-enabled solutions that address critical problems on Earth.

After growing to over 150 employees and closing a \$150 million Series D funding round to continue expanding capabilities, the company was valued at \$800 million in December 2024. It has also expanded its global presence with teams and offices in the US, Canada, Luxembourg, and Chile.

In early 2025, the company also announced construction of its new global headquarters and hyper factory for next-gen space and climate technologies in Adelaide, a state-of-the-art facility at the Adelaide Airport with capacity to produce hundreds of satellites and thousands of advanced sensors annually.



The South Australian Government has worked to support Fleet Space's ambitions since inception, including through grants and support during the company's exponential growth.

"There are few places that can match South Australia's support for R&D, talent pool, and government support. As Fleet Space continues to expand globally, I'm proud to advance efforts that encourage women to pursue careers in STEM and the space industry at home and around the world."

Flavia Tata Nardini, CEO and Co-Founder, Fleet Space Technologies

¹ Department of Primary Industries and Regions, Primary Industries Scorecard 2022-23, pg. 3.

Leveraging South Australia's high-profile major events

Trade and investment programs aligned with South Australia's major events will deliver economic growth for our state.

South Australia has a track record for delivering world-class, high-profile sporting and cultural events.

To maximise the economic impact of these events, the South Australian Government will deliver a strategic program of engagement with national and global investors, importers and other industry stakeholders coinciding with hosting at major events.

Through strategic alignment to key investment opportunities, in-event hosting and networking aims to facilitate connections between decision-makers in priority markets and sectors, providing investors with direct access to leaders in government, business, and industry.

Similarly, international importers are hosted in South Australia in line with high-profile major events. These events provide an ideal networking opportunity to facilitate connections with local exporters eager to showcase how they can meet demand for products and services.

By showcasing South Australia's unique economic strengths and competitive advantages during these high-profile events, these efforts help establish connections with the potential to generate long-term economic benefit.

This approach elevates the state's profile as an attractive investment and trade destination on the global stage, while also continuing to develop a robust pipeline of investment projects and export leads, through engagement with existing and prospective partners.





Connecting South Australian businesses with private equity investors at the AFL Gather Round

Since 2023, DSD's Invest SA team in partnership with Morgan Stanley, has hosted private equity investors during the AFL's annual Gather Round in Adelaide, connecting South Australian businesses with potential investors for valuable growth and collaboration opportunities.

Each year through a targeted selection model, South Australian companies are given the opportunity to present their business models, growth strategies, and investment opportunities to a network of engaged investors.

These presentations are followed by networking sessions which facilitate development of key relationships which have the potential to result in further investment into South Australia.

To date, notable South Australian companies such as Fleet Space, Complexica, Tiimely, and QuantX Labs have participated, showcasing the diversity and innovation of the local business landscape to key investors and decision makers.

Past hosting at Gather Round in 2023 and 2024 led to tangible outcomes. For example, Fleet Space secured a \$3 million investment after meeting investors at the event, while Baily Abbott successfully completed a capital raise, citing Gather Round as instrumental. Other companies like Neutrog and Andromeda also made significant strides in securing investment or strategic partnerships.

Combining business presentations with high-profile networking events, leveraging the AFL's Gather Round as a platform to host high-profile investors, is proving to be a valuable medium for generating investment and growth for South Australian enterprises.

A strong State Brand

South Australia's brand helps position our state globally, growing awareness, enhancing appeal, and sharing our state's unique story with the world.

The brand, much more than a logo, is the expression of our state's identity and our credentials as a partner for business and industry globally. It distinguishes South Australia from other destinations and increases understanding of the state's strengths, leading to economic benefits across the economy.



Communicating a consistent brand internationally

Brand SA will enable all South Australian businesses, industry and government agencies to collectively build global awareness of South Australia as a place to live, work, study, visit and do business.

It will communicate the brand (developed based on extensive government and industry consultation) to a broad range of stakeholders, encouraging meaningful adoption.

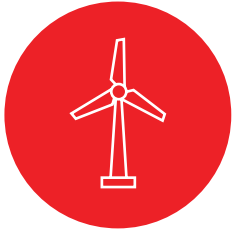
Brand SA will also develop a suite of free-to-use tools and resources that support business and industry to demonstrate their credentials and tell their story to the world.

Brand SA's resources and programs will make it easier for South Australian business and government to communicate a consistent brand and message about what it truly means to be South Australian, and why we are a partner of choice.



Globally competitive industry sectors





Renewables, fuels and cleantech

South Australia is an international leader in integrating wind, solar, and battery energy systems into the state's energy network, with more than 75 per cent of the state's energy generated through renewables.

We are working towards 100 per cent net renewable energy generation by 2027 and have ambitions to generate 500 per cent of the current local grid demand by 2050.

The State Prosperity Project is a critical part of South Australia's aspiration to make the most of our abundant wind and solar resources and to ensure South Australians reap the benefits for generations to come.

We're building world-leading renewable grid-scale projects facilitating investment, green exports and coordinating growth of our low-carbon fuels.

As South Australia continues its industrial decarbonisation, we will work to further decarbonise our industries and inputs through cleantech.

South Australia's sustainability credentials



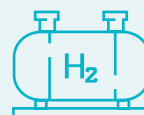
Over 75% renewable energy generation – making the state a world leader



7 grid-scale batteries



Working towards 100% net renewable energy generation by 2027



World-leading hydrogen legislation

Investment and trade opportunities

- Wind and solar farm developments (100 gigawatts of resources with development potential) along with Battery Energy Storage Systems (BESS)
- Decarbonisation research and development to foster international collaboration including cleantech, thermal storage and alternative fuels
- Export of energy efficiency technologies and energy management systems
- Renewable bioenergy from existing and future organic feedstocks
- Hydrogen production and supply chain infrastructure.

Target markets

- UK and Europe
- US and Canada
- Japan and Korea
- China and Hong Kong
- India
- Southeast Asia
- Australia.

South Australian Government supported initiatives

Northern Water desalinisation project is undergoing project approvals and agreements and will provide a new, climate-independent water source for the Far North, Upper Spencer Gulf and Eastern Eyre Peninsula to support growth of the mining, green energy and hydrogen industries.

South Australia's Net Zero Strategy outlines the government's objectives, priorities and actions to reduce greenhouse gas emissions across the economy while creating new jobs, developing new industries, supporting wellbeing, and enabling decarbonisation beyond our borders.

The **South Australian Government's Climate Change Resilience and Adaptation Actions** outlines actions to support efforts across all levels of government, business and the community to better prepare for, manage and adapt to the impacts of climate change.

Strong green credentials supported by the development of the state's new **Biodiversity Act** provide assurance that South Australia's renewable energy, critical minerals, and green manufacturing won't cost the environment and supports simultaneous nature restoration.

State Prosperity Project is a strategic initiative aimed at transforming the state's economy through the development of renewable energy, critical minerals, and green manufacturing. This comprehensive plan focuses on leveraging South Australia's abundant natural resources to position the state as a leader in sustainable industries.

Port Bonython Hydrogen Hub is a government-owned, industry-led multi-user precinct leveraging the state's renewable energy opportunities and enabling export from a clean hydrogen industrial hub.

The Hydrogen and Renewable Energy Act 2023 (HRE Act) provides industry an efficient and clear process for the development of renewable projects and release of grid-scale tracts of Crown designated land.

The South Australian Electricity Development Plan ensures reliable and secure electricity supply while also meeting South Australia's carbon emissions targets.

South Australian industry ecosystem to support

The South Australian Government works closely with the following organisations to facilitate trade and investment outcomes for the state:

- **SA H2H Hydrogen Technology Cluster** works to build the hydrogen supply chain to scale in South Australia by bringing together industry, academia, and government at industry hubs.
- **Heavy Industry Low-carbon Transition Cooperative Research Centre** brings together industries, researchers, and government to decarbonise heavy industries – such as steel, iron, alumina and cement – through development of new low-carbon technologies.





Mining and minerals processing

Unlocking the value of South Australia's rich deposits of mineral resources supports a net zero emissions future and grows the green minerals industries.

Copper, iron ore, uranium and gold are major South Australian export commodities, with opportunities for further growth.

Our state has economically demonstrated reserves of magnetite, graphite, rare earth elements, and minerals sands. The state's resources can play a key role in the global energy transition.

South Australia has developed and attracted leading industry capabilities in minerals exploration, processing, manufacturing, and research, presenting a compelling proposition to investors across the supply chain.

South Australia's share of Australia's mineral resources

68%

of copper, needed to manufacture electric vehicles and wind turbines

67%

of graphite needed to produce batteries

82%

of uranium, used in defence and medical manufacturing

25%

of superior magnetite iron ore resources used in production of green steel

26%

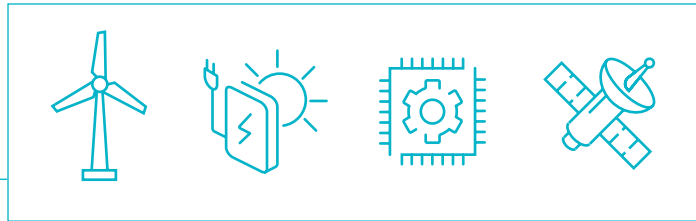
of gold used in electronics for space industry manufacturing

5%

of zircon used in ceramic and space industry products

South Australia is also home to

Frontier provinces
prospective for
cobalt, rare earth
elements, halloysite
and magnesium used
in **critical technology**
development



Investment and trade opportunities

- Exploration, extraction and production of mineral resources to assist production of green iron and steel and support decarbonisation
- Expanded minerals processing hubs, supporting greater exports of critical minerals that are higher up the value chain
- Research and development collaboration in minerals processing, manufacturing and industrial decarbonisation
- Global mining equipment, technology and services (METS) partnerships.
- In response to the **Australian Government's Critical Minerals Strategy, the Critical Minerals South Australia** project advances knowledge to support critical minerals discovery and exploration in South Australia.
- **A White Paper on the energy transition** is being developed to guide delivery of an affordable, reliable and secure energy system for South Australia.
- The **South Australian Resources Information Gateway Core Intelligence (SARIG CI)** enables modern data drive exploration and enhances pre-competitive mineral exploration data to foster and promote frontier exploration.

Target markets

- UK and Europe
- Japan and Korea
- China and Hong Kong
- US
- India
- Australia.

South Australian Government initiatives to support

The Department for Energy and Mining (DEM) leads on development and implementation of the following strategies and initiatives designed to expedite industry growth.

- The **Green Iron and Steel Strategy** positions South Australia as a partner of choice for decarbonised steel making, with the Whyalla Steelworks the first priority for transformation.

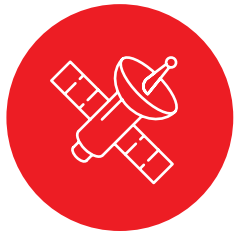
South Australian industry ecosystem to support

The South Australian Government works closely with the following organisations to facilitate trade and investment outcomes for the state:

- The **Australian Critical Minerals Research Centre** at the University of Adelaide is the first facility in Australia to carry out multidisciplinary research in the discovery and extraction of critical minerals.
- **BHP's smelter and copper expansion plans** position South Australia as a global leader in the supply of copper supporting the energy transition.



South Australian copper exports have increased 74% over the five years to 2023/24



Defence and space

South Australia will be home to the construction of nuclear-powered conventionally armed submarines (SSN-AUKUS) – the most complex program in the nation’s history – under the AUKUS trilateral security partnership between Australia, the UK and the US.

This landmark project builds on the state’s longstanding leadership in defence and space, with government and industry investments securing that position for decades to come.

South Australia has comprehensive defence infrastructure and modern facilities that support the advancement of manufacturing, research, and technological development.

Seven of the world’s top 10 defence companies have a presence in South Australia. These companies, supported by more than 400 SMEs are delivering for defence across maritime, aerospace, land, systems and cyber domains.

This growing innovation ecosystem includes world-leading artificial intelligence, virtual reality, quantum, data analytics, and cybersecurity capabilities.

South Australia also has a proud history of leading national and international space efforts, with a thriving space sector.

It is home to the Australian Space Agency, Australian Mission Control Centre, the nation’s first state-owned satellite and more than 100 space-related organisations.

The state brings together world-class researchers with innovative space companies and ambitious start-ups to deliver cutting-edge space technologies and services.

South Australia’s defence and space ecosystem positions the state to support the domestic ambitions of Australia’s allies.

Home to world and nation-leading defence and space activity



Construction of nuclear-powered conventionally armed submarines

400+

defence companies

100+

space organisations

50+

years of secured defence industry activity

Investment and trade opportunities

- US and UK naval maritime infrastructure, sustainment and build linked to AUKUS pillar I
- Critical technology capabilities aligned to AUKUS pillar II, including guided weapons, quantum technologies, artificial intelligence, autonomous systems, virtual reality, data analytics, and cybersecurity
- Launch, returns, upstream and downstream space capabilities and strategic infrastructure
- Positioning South Australia as a testing, maintenance, repair and upgrade location for air and naval platforms.

Target markets

- US
- UK and Europe
- Japan and Korea
- India
- Southeast Asia
- Australia.

South Australian Government initiatives and services to support

Defence SA is South Australia's lead government agency for all defence-related matters and plays a central role in driving South Australia's defence ecosystem on a global scale.

The **Defence Innovation Partnership (DIP)** is a collaborative initiative of Defence SA, the Defence Science and Technology Group and South Australia's public universities. DIP leverages close relationships with the Department of Defence to support collaborative activities aligned with defence priorities.

The **Office for AUKUS** is a single point of contact for Australian Government agencies, ensuring whole-of-government coordination to deliver on South Australia's leading role in the historic SSN-AUKUS submarine program.

The **South Australian Space Industry Centre** was established to lead the state's space industry development efforts and offer focused and responsive support to drive growth of the local space sector.

The **Defence and Space Landing Pad** is a one-stop-shop to support international companies establishing in South Australia.

The **Defence Supplier Uplift Program** is an opportunity for local defence suppliers to export parts to the US and or UK for shipbuilding and submarine builds.

South Australian industry ecosystem to support

The South Australian Government will achieve investment and trade outcomes by engaging with South Australia's key defence precincts (see the section on 'Leading innovation destinations') and institutions, including:

- **Australian Institute for Machine Learning** which conducts globally competitive research and development in artificial intelligence
- **Australian Space Agency**, which coordinates civil space matters across government and supports growth and transformation of Australia's space industry
- **Australian Cyber Collaboration Centre**, committed to building cyber capacity and securing Australia's digital landscape through business support, training and education, collaboration and the provision of facilities
- **Defence Science and Technology Group**, which brings together interdisciplinary expertise – from across Australia and around the world – to deliver scientific advice and solutions for defence and national security.





Image credit: Southern Launch

World-class spaceports provide a unique offering to international partners

Southern Launch is Australia's leading space mission service provider. Headquartered in Adelaide, the company owns and operates two complementary spaceports in South Australia that have hosted world-first space missions with many more to come.

The company offers bespoke space mission services for orbital and suborbital launch, hypersonic flight, re-entries from space and range services for advanced system testing at the Whalers Way Orbital Launch Complex and the Koonibba Test Range.

Southern Launch hosted the world's first ever commercial spacecraft return to a commercial spaceport with US company, Varda Space Industries. Just ten weeks later, a second spacecraft landed back on Earth at the Koonibba Test Range showcasing the high cadence re-entries possible at Southern Launch sites.

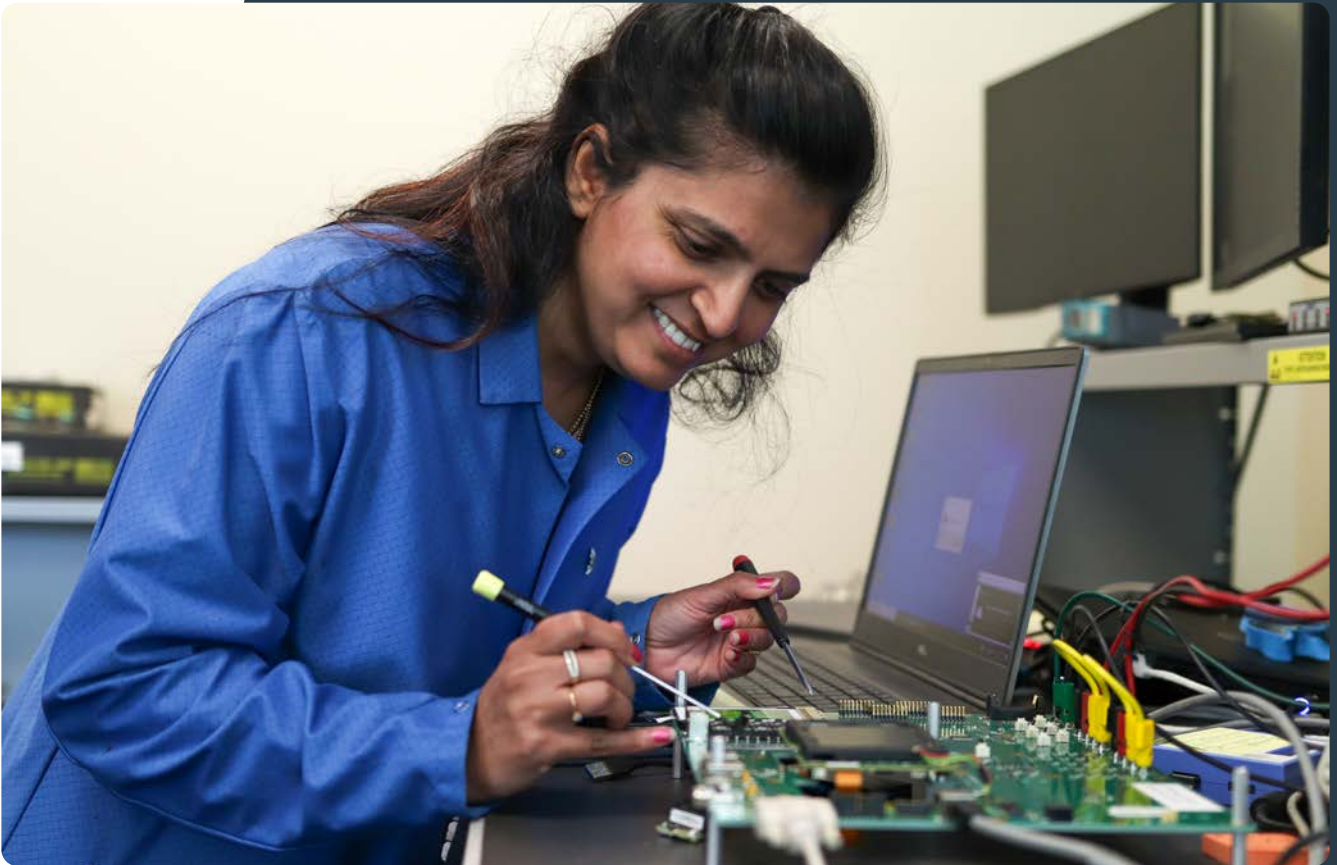
The return of the W-Series capsules proves that manufacturing materials in orbit and returning the materials safely to Earth is not only possible but can become as common as space launch. It's a giant leap forward in an emerging industry that will ultimately benefit everyone on Earth through improved health and materials science, with South Australia at the heart of this global industry.

The achievement is the result of significant year-long efforts by Austrade and the South Australian Government, starting with company introductions and concluding with a treaty-level Australia-US Technology Safeguards Agreement (TSA).

Invest SA assisted Southern Launch through state government planning and approval processes, and has helped the company make connections with customers nationally and internationally, by working with the department's global office network. This has enabled the creation of a new industry sector in South Australia, with export opportunities and the expansion of our state's economy into low-Earth orbit.

"The W-Series missions mark an incredible step forward for Australia as the global hub for orbital re-entries and highlights the potential that goods manufactured on orbit can have for humanity. It's an achievement only possible thanks to a supportive regulatory environment and collaborative government network that recognises the economic value of the space industry."

**Lloyd Damp, Chief Executive Officer,
Southern Launch**



Investment builds local industry capability and supply chain opportunities

Major US defence company, SNC made a significant investment in South Australia, opening its Australian headquarters, SNC AUS, at innovation district, Lot Fourteen.

SNC, which specialises in aircraft modernisation and integration, electronic warfare (EW) technologies, and innovative software solutions, will be a key industry partner to deliver South Australia's commitments under the AUKUS agreement.

SNC's Australian subsidiary will focus on technologies including EW architecture, digital radio frequency, and unmanned platforms and sensors, benefitting from its co-location with world-leading defence, space and technology organisations at Lot Fourteen.

DSD's Americas office worked closely with SNC to attract the company to Adelaide. Both Premier Malinauskas and Trade and Investment Minister, Joe Szakacs, worked closely with SNC as it established its Australian headquarters in South Australia in November 2024.

"The opening of SNC AUS is a key component to SNC's strategic growth plan and its intention to create robust future capabilities in the Australian defence sector.

"As the Commonwealth of Australia continues to grow in importance throughout the Indo-Pacific region, the establishment of SNC AUS will facilitate seamless strategic integration, enabling SNC AUS, SNC US and SNC UK to leverage capabilities across borders and align with the AUKUS trilateral security partnership that is intended to promote a secure, stable Indo-Pacific.

"SNC was already supporting local acquisition programs when we made the decision to open shop in Adelaide. Thanks to support from the South Australian Government, the investment decision was made easy." "

Stu Wildman, Sr. Vice President of Programs, SNC

Image credit: Sierra Nevada Company



International education

Adelaide is a leading education city with established institutions across all areas of study, including universities that rank in the world's top 100.

From early learning in our schools, to vocational education and training (VET), higher education and university, Adelaide's institutions meet the highest standards guaranteed by the Australian Government's Education Framework.

The Australian education system is world-renowned and ranks well above average in international education league tables.

It is this reputation for excellence that has cemented international education's place as a key economic, skills and workforce contributor in South Australia, and as the state's top export.

International education is a critical economic contributor in South Australia

#1

international
education is South
Australia's top
export

59,000+

student
enrolments
in 2024

Top 5

Top 5 fields of study:
healthcare, engineering,
IT, commerce, and food
and hospitality.

Investment and trade opportunities

- Research and development partnerships
- International student attraction (tertiary, VET and school immersion).

Target markets

- China and Hong Kong
- Japan
- India, Sri Lanka and Bangladesh
- Southeast Asia

South Australian Government initiatives to support

International student recruitment will be a key focus to support creation of the new Adelaide University, with the South Australian Government committing \$30 million to attract international students.

StudyAdelaide is funded by the South Australian Government and the state's international education providers. It is a destination marketing and student support agency that partners with the sector to grow global preference for Adelaide as an education destination.

South Australian industry ecosystem to support

The South Australian Government works closely with the following organisations to facilitate trade and investment outcomes for the state:

- **The University of Adelaide** is a 150-year-old university ranked among the top one per cent globally, with a proud history of producing ground-breaking leaders of the future.
- **The University of South Australia**, Australia's University of Enterprise, is a globally connected and engaged university with industry-informed teaching and research.
- **Flinders University** is a university at the forefront of contemporary education and research and has been a centre of inspiring achievement for over 50 years.
- **Torrens University** brings a modern, careers-focused perspective to higher education, reinforced through partnerships with industry and research collaborations.
- **TAFE SA** is South Australia's largest vocational education and training provider.
- **Vocational education institutions** – across various fields of study – have strong industry connections, with training programs and courses at the forefront of industry practice.
- **South Australian Government schools and non-government schools**, deliver educational programs and student experiences to international students.

Universities for the future

The establishment of Adelaide University places South Australia at the forefront of education in Australia. The new university, opening in January 2026, will combine the strengths of the University of Adelaide with the University of South Australia.

Ranked 82 in the world and 8 in Australia in the 2026 QS World Rankings (released in June 2025), Adelaide University is a member of Australia's prestigious and research-intensive Group of Eight universities.

It will transform teaching and learning for contemporary learners and international citizens and help to establish South Australia as a centre for progress and innovation through partnered research that is nation-critical and globally relevant.

Flinders University's new state-of-the-art City Campus and Health and Medical Research Building, opened in 2024, are further expanding opportunities for first-class education, exceptional student experiences, and high-quality research.

Flinders University is one of Australia's fastest growing research universities, backed by its contemporary education aligned to South Australian and global skills needs of the future.





Tourism

South Australia's regions have a growing reputation as world-class holiday destinations with unique experiences such as the wilderness of Kangaroo Island, the vineyards of the Barossa Valley, and some of Australia's most accessible coastline and outback.

Our state is drawing visitors from all over the world, welcoming them as locals to year-round experiences at arts and music festivals, international sporting events, restaurants and boutique laneway bars.

Visitors are attracted to our outdoor lifestyle and nature-based tourism where we celebrate life's simple pleasures.

The state government is committed to growing the state's visitor economy to \$12.8 billion by 2030.

In 2023/24, international tourism expenditure grew to \$1.3 billion, having surpassed the pre-pandemic value of the international travel market. This was despite international visitor numbers remaining below pre-pandemic levels.

The state's business event facilities are world-class and together with major tourism events such as LIV Golf, AFL Gather Round and Adelaide Festival, they play an important role showcasing South Australia to prominent investors and commercial partners.

South Australian tourism at a glance

\$1.3b

**international visitor
spending annually**



**World-class business
event infrastructure
and services**



**Adelaide's world-class
events program is a
drawcard for entertaining
investors.**

Investment and trade opportunities

- Luxury accommodation (refurbishments and expansions), eco-tourism experiences and a range of other assets
- Sustainable tourism experiences that educate visitors about the environment and generate positive environmental benefits
- International tourism attractions and events
- Aviation and cruise industry attraction
- Attracting high-value international travelers and working holiday makers.

Target markets

- UK
- Europe
- New Zealand
- US and Canada
- China
- Southeast Asia
- India
- Japan
- Australia.

South Australian Government initiatives to support

SATC drives destination development, with a strategic approach outlined in the *South Australian Visitor Economy Sector Plan 2030*. SATC also leads attraction of new major and regional events for South Australia.

Invest SA, working with **SATC**, attracts investment in new large-scale accommodation and experiences that drive greater tourism visitation.

National parks and nature-based tourism provide an opportunity to share South Australia's unique environment and endemic biodiversity with the world.

South Australian industry ecosystem to support

The South Australian Government works closely with the following organisations to facilitate trade and investment outcomes for the state.

- **Tourism Industry Council of South Australia** is the peak body for the local tourism industry.
- **Tourism Australia** coordinates roadshows to influence people to travel to Australia, including for events.
- **Regional tourism organisations**, through Regional Development Australia and local council areas, support South Australia's 12 tourism regions.
- **Adelaide Airport Limited** manages our city's airport, which hosts direct flights to most major destinations across the Asia-Pacific and the Middle East.
- **Flinders Port Holdings** is South Australia's leading port operator with seven ports including the Port Adelaide Passenger Terminal which can cater for the largest of cruise liners.
- **Business Events Adelaide** leads attraction of conventions, meetings, exhibitions, and special events to venues including the Adelaide Convention Centre.



Food and agribusiness

South Australia's globally competitive produce is exported all over the world – accounting for about half of all South Australian merchandise exports.

Our premium food, beverage, agricultural and forestry products are key inputs that support food security and high-end consumption across the Indo-Pacific.

South Australia's food and agribusiness sector is built on a strong foundation of research and innovation; together with well-established resource management, robust biosecurity frameworks, and comprehensive food safety and quality assurance standards.

As a leader in sustainability, the South Australian Government has demonstrated its commitment to work with industry, businesses, and research partners to develop technology and strategies to decarbonise and grow sustainably.

We have the workforce and the know-how to harvest and produce quality products to support food security locally and for our international partners.

South Australia is home to a strong and growing green economy ecosystem, supporting Australia and the Indo-Pacific region.

It assists in decarbonising our manufacturing sector by leveraging renewable energy resources and world-leading innovation in resource recovery and circular practices.

South Australia's comprehensive approach to environmental management² is critical with 84 per cent of the state's exports having at least moderate dependence on nature.

World-leading food and agribusiness strengths



Global reputation for producing clean, green, safe, and traceable food



Largest concentration of world-class agricultural research in the Southern Hemisphere

Green economy leadership



South Australia is a leader in the circular economy, including recycling, resource recovery and value-add manufacturing



Diverse feedstocks support bioenergy investment

² Nature-positive advantage: implications and opportunities for South Australia, EY, 2024.

Investment and trade opportunities

- Tech-driven, large scale and intensive primary production
- Manufacturing premium, value-added food and beverage where it grows
- Future food industries including plant and alternative proteins through innovative technology and research commercialisation
- Agritech, foodtech and future food capability to increase productivity, sustainability and efficiency
- Sustainable food and feed production from a nation-leading circular economy supply chain
- Agricultural commodity exports, including grains, pulses, and oaten hay
- Premium fresh and frozen food exports, including seafood, red meat, dairy, and horticulture products
- Packaged food and beverage exports.

Target markets

- China and Hong Kong
- Japan and Korea
- Southeast Asia
- US
- Europe
- Middle East
- Australia.

South Australian Government initiatives to support

The **Biosecurity Act 2025** provides a contemporary framework to protect South Australia's primary industries from pests, diseases, and other biosecurity risks.

The **Premium Food and Wine Business Growth Programs**, administered by DSD, will help South Australian exporters make connections with importers and distributors through inbound immersion, food activations and promotions with leading national and international retail and hospitality partners.

The **South Australia Food and Beverage Five-Year Export Strategy**, led by Food South Australia and supported by DSD, sets the goal of increasing export sales from \$2.6 billion to \$3 billion by 2027.

The **South Australian Research and Development Institute (SARDI)** delivers applied science that underpins the growth and sustainability of South Australia's primary industries, food and wine.

South Australian industry ecosystem to support

The South Australian Government works closely with the following organisations to facilitate trade and investment outcomes for the state.

- **Food South Australia** is the state's peak body for food and beverage manufacturers, processors and producers.
- **Primary Producers SA** is the representative body for the various primary industries, including grains, dairy, and livestock.
- **Waite Research Precinct** is home to the largest concentration of agriculture and wine research and teaching expertise in the Southern Hemisphere, including the University of Adelaide, CSIRO, and SARDI.
- **Distillers South Australia** promotes South Australia as a leading spirits and liqueurs region to support rapid growth of the sector.
- **Seafood Industry South Australia** is the peak body for the seafood industry in the state.
- The **South Australian Forest Products association** represents all elements of forestry products value chain in the state.



Wine

Our state is Australia's indisputable wine capital and Adelaide is a Great Wine Capital of the world, alongside the likes of Bordeaux, Napa Valley and Rioja.

Internationally recognised for producing the best wine in the world, we owe our diverse wine styles to an array of terroirs, from coastal regions with cool breezes, to high altitudes and rich red soils.

We are home to the oldest continuously producing Cabernet Sauvignon vineyard in the world and Australia's oldest family winery, as well as prestigious brands like Penfolds, Hardy's and Henschke.

South Australia is a leader in wine product innovation and sustainable winegrowing practices, built on a more than 200-year history, which has seen our industry continually embrace the latest in clean agricultural technologies.

South Australia is also a leader in organic, biodynamic and natural winemaking in Australia, with the latest technologies brought into play through Australia's leading wine education and research facilities.

The combination of diverse terroir, old vines, winemaking tradition, iconic grape varieties, sustainability practices, and research and innovation, distinguishes South Australian wine from other regions, making it a compelling choice for wine enthusiasts worldwide.

Celebrated South Australian wine credentials

80%

of Australia's premium wine is produced in South Australia

18

distinct and diverse wine regions

700+

wineries from boutique to globally recognised brands

70%

Home to 70% of Australia's wine and grape research extension capability³



Adelaide is one of 11 Great Wine Capitals of the World

³ Wine and Viticulture | Waite Research Institute | University of Adelaide, Australian Wine Research Institute

Investment and trade opportunities

- Premium wine exports across a broad range of varieties
- Technical skills and research partnerships for viticulture
- World-leading agritech and precision fermentation technologies
- Innovative wine packaging and circular economy capabilities
- Agritech to drive productivity and sustainability, including automation and precision production.

Target markets

- China and Hong Kong
- Southeast Asia
- Japan and Korea
- US and Canada
- UK
- New Zealand
- India
- Europe.

South Australian Government initiatives to support

Adelaide, as a member of the **Great Wine Capitals of the World** global network, including 12 internationally renowned wine regions, encourages travel, education and business exchanges between the prestigious wine regions.

The **South Australian Wine Export Diversification Program**, led by DSD, is designed to support wine producers to diversify into new markets and grow sales of premium South Australian wines.

The **Premium Food and Wine Business Growth Programs**, administered by DSD, will help South Australian exporters make connections with importers and distributors through inbound immersion, food activations and promotions with leading national and international retail and hospitality partners.

The **South Australian Wine Ambassadors Club** creates an international network of advocates who share a passion for South Australian wine, helping to raise the profile of our offering, and expand exporter access to new markets.

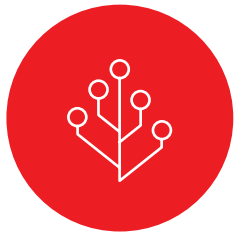
The **Wine Exporter China Re-Engagement Support Package**, led by DSD and PIRSA in partnership with the South Australian Wine Industry Association, supports the South Australian wine sector for risk-managed re-engagement with China.

South Australian industry ecosystem to support

The South Australian Government works closely with the following organisations to facilitate trade and investment outcomes for the state:

- The **South Australian Wine Industry Association** is the peak body representing the viticultural and winemaking interests of the state, helping wine companies prosper in the global marketplace
- **Wine Australia** is the nation's peak body representing the wine industry, investing in research, development and industry promotion
- Regional wine and grape-growing associations represent South Australia's diverse wine and grape-growing regions.





Critical and emerging technologies

South Australia has world-class critical and emerging technology capabilities, attracting international attention and partnerships.

These capabilities will further strengthen our position as a security partner of choice and help us forecast and prepare for the technology demands of the future.

Our critical and emerging technology capabilities aligned with the national interest, are supported by transformational institutes conducting world-class research and development.

These same capabilities can also be applied to help solve data analysis, sustainability, health and medical, creative industries and manufacturing challenges – and they're attracting multinational corporations to South Australia.

South Australia's capabilities include:

- world-leading artificial intelligence, machine learning and computer vision capabilities
- a mature and growing cyber security ecosystem
- strong frontier technologies, including photonics and quantum sensing research and industry capabilities.

Critical and emerging technology strengths



The Australian Institute of Machine Learning is the top AI research institute in Australasia



The Australian Cybersecurity Collaboration Centre is a central connection for cyber resilience improvement



Global and national technology companies in South Australia to innovate



Exceptional connectivity with high reliability, low latency optic fibre connectivity throughout greater Adelaide

Investment and trade opportunities

- Commercial and research partnerships in frontier technologies including: machine learning, cybersecurity, photonics and quantum sensing
- Critical technology capabilities linked to AUKUS pillar II for export
- Investment into our strong Gaming and visual effects industry to further grow services exports.

Target markets

- US and UK
- Japan and Korea
- Europe
- India
- Southeast Asia
- Australia.

South Australian Government initiatives to support

DSD supports establishment and growth of local start-ups by connecting founders with the tools, knowledge and resources required to accelerate business success.

South Australia's Advanced Manufacturing Strategy – developed by DSD in collaboration with industry – leverages our competitive advantages to embrace sovereign manufacturing in a circular, net zero industrial future.

South Australia's Artificial Intelligence Strategy, to support growth of the state's AI capabilities, is also in development.

The **A Place to Create policy**, led by the Department of Premier and Cabinet, sets out a whole of government approach to supporting the arts, culture and creative industries, including actions to develop export markets and create opportunities for international collaboration.

South Australian industry ecosystem to support

The South Australian Government works closely with the following organisations and industry sectors to facilitate trade and investment outcomes for the state.

The Australian Institute for Machine Learning (AIML), based at Lot Fourteen, is a world-class research institute within the University of Adelaide. It has over 180 members and has demonstrated an effective and sustainable model for research collaboration between universities, industry and government.

It has partnered with local and global organisations such as Commbank and the CSIRO to help innovate their products and services.

South Australia's **mature and growing cyber security ecosystem**, is home to over 50 companies with specialised capability that are supporting some of the nation's largest defence contracts.

Nation-leading hubs for cyber expertise, such as **Australia's Defence, Science and Technology's Cyber Electronic Warfare Division** have headquarters in South Australia.

South Australia's strong **frontier technologies (photonics and quantum sensing research and industry capabilities)**, are driven by about 50 businesses operating in the photonics/quantum sector, with strengths in the defence and space, renewable energy and green hydrogen, and the health and medical industry sectors.

The **University of Adelaide's Institute for Photonics** (IPAS) works with partners to deliver research on quantum materials, quantum clocks, quantum optical fibre, quantum sensing and quantum communications.

The state's **creative industries** sector employs more than 1 in 10 of Australia's game developers, collaborating to create world-leading visual effects.



Health and medical

Adelaide and South Australia offer a world-class health and medical ecosystem – the heart of which is Adelaide BioMed City.

Adelaide BioMed City is one of the world's most connected and technologically advanced life sciences precincts, bringing together universities, government, hospitals and more than 2,000 researchers.

Adelaide leads the nation in artificial intelligence (AI) for healthcare. South Australia's unique data assets include a single electronic medical

record across a universal healthcare system for 1.8 million people, with unique identification for each patient.

These assets and capabilities open the door to investment opportunities which will improve patient care through local and international partnerships driving research and development into new products or services.

South Australia's health and medical ecosystem



Leader for personalised health innovation – with unique clinical data set for use by AI talent



Australia's most experienced and complete clinical trial ecosystem



Home of Australia's medtech programs



Advanced device manufacturing capabilities

Investment and trade opportunities

- Research and innovation partnerships
- Investment from companies that will extend the local supply chain's digital transformation, including digital health, clinical trials medtech, biotech, pharma, manufacturing
- Clinical trials.

Target markets

- US
- UK
- Europe
- Japan, Korea and Taiwan
- China – trade focus
- Middle East
- Australia.

South Australian Government initiatives to support

The **Medical Device Partnering Program**, an initiative of Flinders University Medical Device Research Institute, is jointly funded by the South Australian Government to foster collaboration between researchers, industry and end-users to create medical technologies addressing clinical needs.

The **MTPConnect Adelaide Intermediary Program** is focused on growing South Australia's health and medical industry sector by fostering collaboration, strategically building capacity and attracting new talent and opportunity across the research, innovation and translation value chain.

South Australian industry ecosystem to support

The South Australian Government works closely with the following organisations to facilitate trade and investment outcomes for the state:

- **Adelaide BioMed City**, including the South Australian Health and Medical Research Institute, is one of the leading medical research precincts in the Southern Hemisphere
- **University of South Australia's Centre for Cancer Biology** is a medical research institute carrying out world-class, innovative research into the fundamental causes of cancer
- **Flinders University's Health and Medical Research Institute** is a multi-disciplinary, highly dynamic and skilled community of researchers
- **University of Adelaide's Robinson Research Institute** strives to find new ways of preventing, treating, and curing childhood disease
- **Massachusetts Institute of Technology (MIT) Connection Science** works with DSD, as part of a consortium, dedicated to revolutionising technology-mediated human networks.

A connected and accessible government support network

The South Australian Government has a streamlined and responsive government ecosystem that offers direct access to decision makers that maximises value-add for major projects.

Department of State Development

DSD is South Australia's key economic development agency, dedicated to driving growth across South Australia's economy, including workforce and skills, research and innovation, industry development, trade, and investment.

The department leads the whole-of-government effort to deliver this strategy and involves each of the following teams.

Invest SA

Invest SA attracts investment by promoting globally competitive sectors to international and national investors. Invest SA fast-tracks investments, identifies optimal locations, connects investors with government and industry partners, and coordinates project delivery.

TradeStart

A partnership with Austrade, TradeStart provides tailored export advisory services and export readiness initiatives to businesses across the state. Advisers are based both in Adelaide and across key regional centres.

Brand SA

Brand SA is the custodian of South Australia's brand, promoting the state as a place to live, work, study, visit, invest and trade. Brand SA enhances the profile of goods, services, experiences and produce locally, nationally and internationally.

Office for Small and Family Business

This office supports businesses to start, grow and succeed, serving as a connection point to the array of government services designed to drive growth of businesses in globally competitive industry sectors.

StudyAdelaide

StudyAdelaide is a partnership between the South Australian Government and over 50 education institutions, working to increase awareness of Adelaide as a preferred international study destination.

Department of the Premier and Cabinet (DPC)

DPC is the central government agency overseeing protocol, diplomatic relations, and high-level government and business missions. DPC, in partnership with DSD, aligns investor and importer visits with major events and activations in South Australia.

Department for Infrastructure and Transport (DIT)

This department is responsible for managing the state government's infrastructure delivery including social and civil infrastructure, transport and marine to maximise the benefit of the government's investments.

This includes leading implementation of South Australia's Freight and Supply Chain Strategy, which provides a vision for a commercial freight and supply chain network that is safe, productive and sustainable.

Department of Housing and Urban Development (DHUD)

This department works across-government and industry to coordinate effort that accelerates planning and development pathways, investments in essential infrastructure and removes impediments to private sector construction.

South Australian Tourism Commission (SATC)

This agency assists in growing economic and social benefits through the promotion of South Australia as a tourism destination, the growth and development of states tourism industry and offering.

Renewal SA

Renewal SA is dedicated to unlocking land for residential, commercial and industrial development and partnering with Invest SA and the private sector to deliver projects that benefit the state.

Department for Environment and Water (DEW)

This department is responsible for transparent and streamlined regulatory processes and transparent reporting that provides certainty for investors. Biodiversity Sensitivity Mapping helps support the right development in the right places and secure positive environmental outcomes alongside economic development.

Defence SA

This is South Australia's lead government agency for defence matters, streamlining interactions to capture investment opportunities and leading participation in national initiatives.

Department for Energy and Mining (DEM)

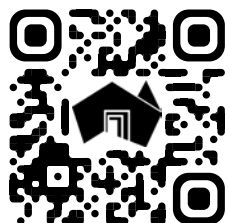
DEM leads on development and implementation of the strategies designed to expedite industry growth, including green iron and steel, copper, critical minerals and the energy transition.

Department of Primary Industries and Regions (PIRSA)

PIRSA is a key economic development agency and is responsible for maintaining prosperity and advancing the sustainability of the state's primary industries and regions.

Contact us

To learn more about South Australia's international engagement activities, including trade and investment support visit:





WORLD EXPO
2025 OSAKA

【南オーストラリア州政府】
大阪万博開幕記念イベントのご案内
4月16日

AUSTRALIA
SOUTH AUSTRALIA



OFFICIAL PARTNER

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South Australia

Trade and Investment Strategy to 2030



**Government of
South Australia**